



Draft Five Year Vision Implementation Plan

Background

Effective strategic planning is an iterative process through which the initial draft of the plan is continually discussed, assessed, and revised to ensure that goals and objectives are being met and that emerging exigencies in the university's internal and external environments are being addressed. Internal and external exigencies have surfaced since *Vision Ohio* was launched in late 2004 that must be incorporated within this iterative process. Examples of such internal exigencies are infrastructure problems related to information technology and financial practices as well as the challenge of funding new academic initiatives. Examples of external exigencies are the University System of Ohio, changes in state funding for higher education, and an uncertain state budget climate which all have immediate and long-term implications for Ohio University.

Vision Ohio has followed such an iterative process from the creation of the draft plan during the 2004-5 academic year through the subsequent work of the implementation teams and planning bodies in the 2005-06 academic year to the steering committee's identification of priorities in Spring 2007. Presented with those priorities and a revised version of *Vision Ohio*, the Board of Trustees requested that the President develop an action plan by August 2007, complete with budget estimates, that would specify how Vision Ohio would be implemented over the next five years. The Board of Trustees also asked that the President share this action plan with the Athens and regional campuses in Fall 2007 for the purpose of seeking comment from members of those campus communities and the constituent groups who represent them.

Fall Quarter Review Process

At the start of the 2007 Fall Quarter, the President appointed a committee composed of faculty, staff, and students from those groups along with deans and vice presidents and charged it with gathering feedback and with submitting a report of its findings to the Executive Vice President and Provost by November 15th. The President also asked the Executive Vice President and Provost to provide recommendations to him based on the comments of the committee upon her receipt of its November 15th report.

The Executive Vice President and Provost presented her report to the President on November 28th containing a series of recommendations on factors to consider in redrafting the plan. Between December 5th and January 4th, the President and Executive Vice President and Provost convened four half-day meetings with the deans and executive staff to review the action plan in light of both the committee's report, the Executive Vice President and Provost's recommendations, and changes in the internal and external environments.

Conclusions, Results, Next Steps

Affirmed in these meetings was the primacy of the academic mission and, concomitantly, the primacy of the plan's first two goals (1) to strengthen undergraduate education and (2) to enhance graduate and professional education and research. Likewise affirmed was the impossibility of meeting these first two goals if substantive progress was not also made in meeting goals three, four, and five. The uniformly shared conclusion reached during these meetings is that sustaining the success of Ohio University's academic mission depends on its ability to achieve the other goals in the plan (3) to recruit and retain talented and diverse students, faculty, and staff; (4) to enrich the environment for students, staff, faculty, and the region; and (5) to fortify and align infrastructure to enhance the academic missions of instruction, research, and service. Put simply, optimal achievement of goals one and two, which is a necessary condition for reaching

goal six (6) to enhance prominence within Ohio, the nation, and the world, will require strong support for goals three, four, and five.

Another conclusion of our meetings was that the implementation of the plan must be accompanied by a university-wide focus on addressing financial, legal, and compliance issues. To that end, three pursuits will be privileged. The balance sheet and the overall financial strength of the university will be improved. Financial controls and risk management will be bolstered. The university will operate in compliance with legal, regulatory, and ethical requirements. Responsibility for helping the university to be successful in these essential pursuits belongs to all employees. Appropriate training will be provided to assist faculty, administrators, and staff fulfill their obligations.

The result of these meetings is a revised action plan grounded in *Vision Ohio* that

- Privileges the academic mission and recognizes student achievement and faculty excellence as fundamental institutional commitments;
- Incorporates some of the concerns expressed in the committee report;
- Adopts a conservative approach in its implementation budget that avoids front-loading investments;
- Recommends using an ordering principle for selecting strategies/priorities for funding based on their contribution to academic excellence and revenue growth and the likely breadth and depth of their impact;
- Acknowledges the need to solve incrementally the infrastructure problems;
- And recognizes the university's obligation to coordinate its planning and decisions in ways consistent with the evolving University System of Ohio.

This revised draft action plan, now known as the *Five Year Vision Ohio Implementation Plan*, will be formally presented to the campuses on January 16 at a meeting of the Five Year Plan Committee (consisting of the original Five Year Academic Action Plan Committee and the Vision Ohio Executive Steering Committee). The Five Year Plan Committee will reconvene for two more meetings. On January 23, the committee will discuss the documents received on January 16. At the January 23 meeting, a draft budget for Year One of the plan will be presented. On January 30, the committee will meet to discuss the draft budget. After the January 30 meeting, the Five Year Plan Committee will dissolve and the responsibility for further work on the Five Year Plan will devolve to the Vision Ohio Executive Steering Committee, the Budget Planning Council, and the Deans, Vice Presidents, and Executive Staff Group.